

WPAFB INCOME TAX PREPARATION – TY 21
5135 Pearson Rd., Building 10.

Please be aware that our tax preparers are not tax accountants; they are active duty, civilian, or retired personnel who have taken a short course in BASIC tax preparation and as such, are not prepared to do complicated tax returns. If you have extensive investments, a sizeable personal business, limited partnerships, foreign investments, casualty or theft losses, you will be referred to a paid preparer. If you have a question about this, call the tax center at (937) 257-6150.

The tax center lost its previous location, and thus had to scale back what services would be offered. **Eligible tax center clients for tax year 2021 are active duty airmen E-4 and below and O-2 and below only.** The tax center will *not* be servicing retirees. Please contact the tax center directly or click the link on the 88th JA website for a list of off base tax preparation services. These off base services are provided at no cost.

The tax center will be operating 100% virtually. Contact the tax center directly for directions on how to submit your documents online, along with the IRS Form 13614-C. Once the preparer receives all of your required documents, they will prepare your refund and contact you directly if they have any questions. Once the refund is complete, you will be contacted with a time and date to come to the tax center to sign for and receive your prepared return.

We WILL NOT do married filing jointly versus married filing separately comparisons. We can only give you a general idea of what the difference will be.

If you sold stock, bonds, or mutual funds, you **MUST** have the cost basis for the sale. This is the total cost, with dates of all purchases, reinvested dividends, and sales. Contact your broker if you don't have this information. If you have more than 20 separate stock or bond sales we may send you to a paid preparer as we probably cannot complete your tax return within the allotted time.

If you cannot submit your documents electronically, you can drop them off in person on Wednesdays and Fridays only. We are located in Area A, Bldg 10, 5135 Pearson Ave. Please go to the Legal Assistance waiting area and tell a paralegal that you are submitting documents for the tax center.

WHAT IS REQUIRED FOR TAX PREPARATION:

Please appropriately title your submitted document before uploading it to the website. Failure to do so may affect the timeliness of filing

TAX RETURNS: IT IS VERY IMPORTANT THAT YOU SUBMIT LAST YEAR'S FEDERAL AND STATE RETURN.

PERSONAL DATA

Picture ID. Social Security numbers, including spouse and children. We cannot complete your return without SSANs or ITINs. Bank routing number and account number if you want a direct deposit of refund or payment of amount owed.

EMPLOYMENT AND INCOME DATA

W-2 Forms

Alimony received

Jury Duty pay
Gambling and lottery winnings and losses; Form W-2G
Scholarships and fellowships
Tip income
Annuities
Self-employment income and expenses, 1099-MISC
Retirement, pension, or IRA distributions; Form 1099-R
Social Security; Form SSA-1099
Prior year state and local tax refunds; Form 1099-G
Unemployment compensation; Form 1099-G
Interest; Form 1099-INT and 1099-OID
Dividends; Form 1099-DIV
Proceeds from broker transactions; Form 1099-B and capital gains
Rental income and expenses, including depreciation
Business income and expenses (\$10,000 limit on expenses), including vehicle mileage (personal and business)
Schedule K-1 from partnerships, estates, or trusts
1099-C Cancellation of Debt

DEDUCTIONS (not itemizing)

Alimony paid (need recipient's Social Security Number)
Education expenses: student loan interest, tuition, books, fees, supplies and equipment
Child and dependent care expenses, including provider's tax ID or SSAN, and address
IRA (ROTH and traditional), Keogh, 401-K, and other retirement contributions
Unreimbursed moving expenses
Residential energy credits
Adoption expenses
Medical/Health savings accounts
If you have large medical/dental expenses but you don't have enough deductions to itemize on your federal return, expenses exceeding 7.5% of your adjusted gross income may still be deducted on the OHIO form.

SCHEDULE A – ITEMIZED DEDUCTIONS

Above data, plus:
Medical and dental expenses and health insurance. Expenses exceeding 10% of Adjusted Gross Income are deductible (7.5% if over age 65).
State and local income taxes OR general sales tax. Taxes paid on a new or used automobile, motorcycle, motor home, airplane or boat may be deductible. Also bring LES (if active duty) and non-taxable veteran's benefits (if retired)
Real estate taxes
Personal property taxes
Home mortgage interest and points; Form 1098
HUD-1 closing statement if you purchased or refinanced a home in 2014
Private mortgage insurance, if home purchased after 2006
Cash gifts (charitable contributions). Must have written proof of each gift.
Non-cash gifts (charitable donations). If over \$500 total, you must have an itemized list and be able to substantiate date of purchase, purchase cost, and value for each item.
Vehicle mileage for charity work
Unreimbursed employee expenses—military moving expenses, job travel, union dues, job education, subscriptions, job hunting expenses, etc.
Other expenses – Tax preparation fee, investment, safe deposit box, etc.
NOTE: Total unreimbursed employee expenses, tax preparation fees and other expenses must exceed 2% of adjusted gross income to be deductible.

OTHER DOCUMENTS

Prepaid federal, state, and local tax vouchers. Need date paid and amount.

Schedule D worksheet for capital loss carryover from previous year(s)

Divorce decree or separation agreement involving custody of children or payment of taxes

Power of Attorney if spouse is not available to sign

Health Insurance Forms 1095-A, 1095-B, 1095-C